Missile Defence, and Counter Countermeasure), Platform (Military Aircraft, Military Helicopters, and Unmanned systems), Product and

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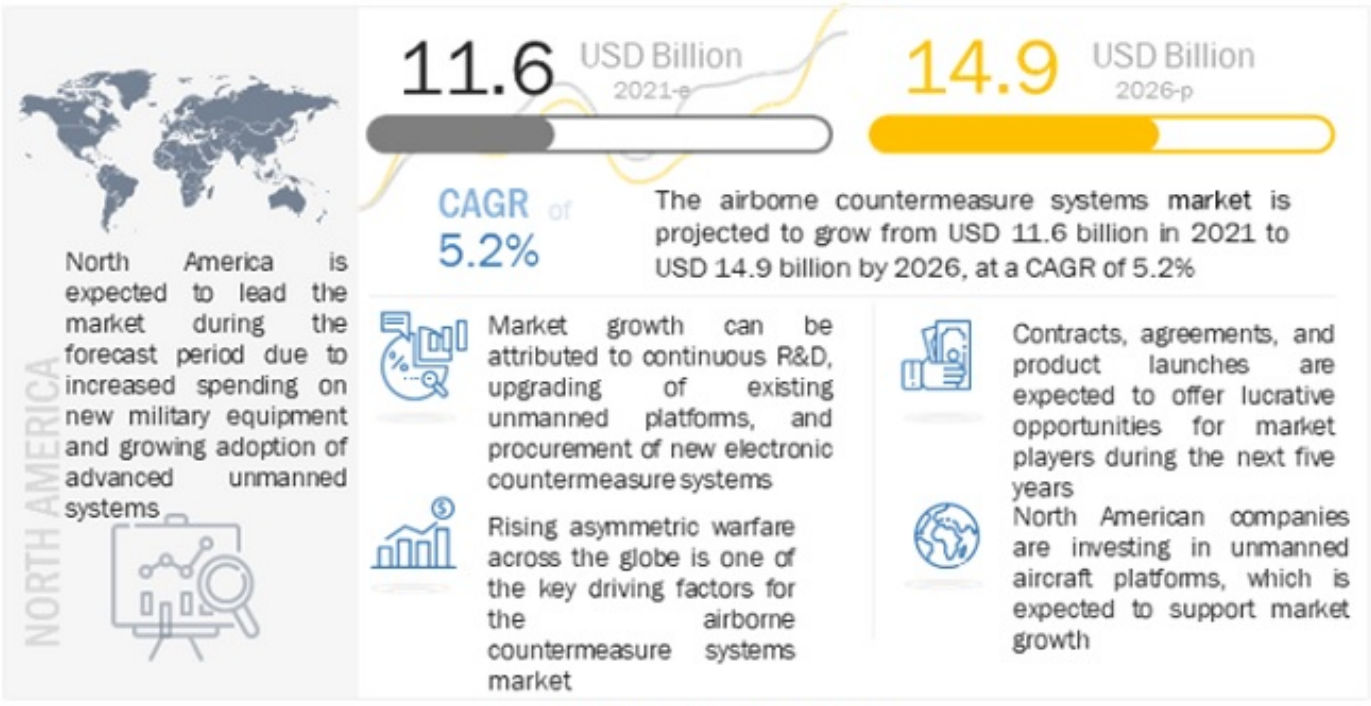
[302 Pages Report] According to MarketsandMarkets **Airborne Countermeasure Systems Market** is projected to grow from an estimated **USD 11.6 billion in 2021** to **USD 14.9 billion by 2026**, at a **CAGR of 5.2%** in terms of value during the forecasted period. It is witnessing significant growth due to increasing new technologies and demand of going Airborne Countermeasure Systems. The North American region will dominate, due to the growing investments in **Airborne Countermeasure Systems Industry**.

Overview of Airborne Countermeasure Systems Market



e - Estimated; p - Projected

Source: Secondary Sources, Publications, Articles, and MarketsandMarkets Analysis

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COVID-19 Impact on market

The Airborne Countermeasure Systems market includes major players such as Lockheed Martin Corporation (US), Israel Aerospace Industries Ltd. (Israel), Northrop Grumman Corporation (US), Saab AB (Sweden), L3Harris Technologies, Inc. (US), Leonardo SPA (Italy), BAE Systems (UK), Aselsan AS (Turkey), and Textron Systems (US). These players have spread their business across various countries includes North America, Europe, Asia Pacific, Middle East & Africa, and Latin America. COVID-19 has impacted their businesses as well.

R&D in airborne countermeasure systems are constantly evolving, considering the current scenario and the countries cutting down their defense budget in might be a hindrance to the growth of this technology The manufacturing activities have faced operational and running activities due to the import and export regulations. Currently, control of the COVID-19 outbreak is an international concern and has become a crucial challenge in many countries.

Market Dynamics

Driver: Increased acquisition of unmanned warfare systems because to rising transnational and regional insecurity

The rising frequency of bilateral armed confrontations between nations is advancing at a rapid rate, necessitating a greater requirement for countries' defense forces to enhance their security measures. To meet the demands of battle, new weaponry and fighting systems are being created. With the development of digital battlefields, electronic warfare technology has been integrated into unmanned systems. These technologies have led to a shift in nations' purchase priorities to stay in sync with growing military demands.

For example, political instability and terrorism in Iraq and Syria in the Middle East have resulted in military confrontations since 2014, with numerous terrorist organizations increasingly employing high-tech weaponry. Countries in this area are boosting defense spending to incorporate modern systems to protect their borders from these weapons. Saudi Arabia, the UAE, and Qatar have boosted their investments in radar and air defense systems in this region. Saudi Arabia, for example, intends to purchase S-400 air defense systems from Russia in the future.

Over the period of 2015-2019, China and Pakistan conducted multiple incursions into India, resulting in hostilities between these countries. The Turkish government authorities announced the purchase of Russian S-400 air defense systems in October 2019. Rising conflicts in the South China Sea between China and its neighbors, including Vietnam, Indonesia, Taiwan, Malaysia, and the Philippines, have prompted these nations to raise their defense budgets. Because of the tensions between Russia and NATO, nations such as Romania, Poland, and Ukraine have increased their spending on air defense systems. Russia intends to upgrade and improve its airborne countermeasure capabilities as well. These initiatives for military capabilities upgrading will fuel the market for airborne countermeasure systems.

Restraints: Concerns over error possibilities in complex combat situations

With various governments adopting AI-powered systems for surveillance and automation,

concerns are being raised, stating that human control over robots is necessary to ensure control and humanitarian protection. There is also concern among humanitarian organizations like Human Rights Watch regarding whether governments are secretly developing “Automated Killer Robots” to top the AI arms race. This compels governments to publicly declare their current capabilities and refrain from developing autonomous weapons and fully automated robots, as these will be incapable of meeting the standards of International Humanitarian Law.

Additionally, the possibility of errors is also high with AI systems. Since they make quick decisions, they may not be able to adapt to the inevitable complexities of war. As a result, these systems might not accurately distinguish between combatants and non-combatants or threats and system anomalies and ultimately be less accurate and precise than human operators. These problems could be magnified if systems are fielded before being adequately tested or if adversaries succeed in spoofing or hacking into them.

Opportunities: Enhanced system reliability and efficiency by adopting traveling wave tube-based solutions

Various countries are demanding mission-critical systems with maximum reliability. The introduction of Traveling-Wave Tube (TWT)-based solutions has resulted in improved efficiency of electronic countermeasure systems. TWT is a dedicated vacuum tube used in electronics to amplify radiofrequency. TWT-based solutions can provide the widest range of capabilities such as efficient broadband performance and high output power. However, the adoption of TWT-based solutions is negatively impacted by the increased use of GaN technology. Hence, TWT manufacturers are making efforts to increase the bandwidth and frequency of TWT-based solutions. The rise in defense funding programs for GaN devices, such as advanced active electronically scanned array (AESA) radar and next-generation jammer (NGJ) technology, is projected to drive the adoption of GaN technology, thereby acting as a threat to manufacturers of TWT-based solutions. Manufacturers of TWT are working on improvements in tube technology, which has led to the increased reliability, power output, frequency, and lifespan of these tubes. Thus, the integration of TWT-based solutions with electronic countermeasure systems to improve system reliability and efficiency is providing growth opportunities to developers of unmanned electronic countermeasure systems.

Challenges: High deployment costs

The increasing importance of unmanned electronic warfare in tactical and strategic roles in modern warfare environments has propelled the need for new, effective, and affordable electronic warfare systems. These systems use electromagnetic radiations to ensure secure transmission of data. Unmanned electronic warfare systems encompass multiple capabilities such as electronic attack, electronic protection, and electronic support. These systems are required to perform various essential functions in diverse threat environments. They must identify all emitters in an area of interest using SIGINT techniques to determine their geographic locations or ranges of mobility, characterize their signals, and determine the strategy of enemy conflict. Achieving the performance levels expected for the next generation unmanned electronic warfare systems becomes a formidable task due to the complexity of these systems. These systems require

complex designs to serve in high-magnitude signal environments. One of the key challenges faced by manufacturers of unmanned electronic warfare systems is modifying and programming these systems. Advanced EW technologies are required to operate in a crowded electromagnetic (EM) environment, and a cost-effective open system approach will help achieve challenging design goals. The electronic warfare systems market is expected to be cost-dependent due to the requirement of heavy R&D investments, which serves as a challenge for manufacturers.

Based on platform, the military aircraft segment is projected to grow at the highest CAGR during the forecast period.

The growth in the Airborne Countermeasure Systems market is expected to drive the growth of the three platforms proportionately. The requirement of military aircraft in battlefield for surveillance and threat detection capabilities is expected to drive the market during the forecast period.

Based on product, the Self-Protection EW Suite segment is projected to grow at the highest CAGR during the forecast period.

Based on product, Self-Protection EW Suite segment is projected to grow at the highest CAGR during the forecast period. The requirement of electronic suites helps in protecting the aircraft by shielding and reducing human loss and increasing capabilities, and investments in R&D towards these systems are helping the growth of the market for Airborne Countermeasure Systems.

Based on application, the Counter Countermeasure Systems equipment segment is projected to grow at the highest CAGR during the forecast period

Growing demand for counter countermeasure systems due to their high demand for antijamming and deception techniques in countermeasure applications are projected to increase the growth of the Airborne Countermeasure Systems market.

To know about the assumptions considered for the study, **download the pdf brochure**

The North America region is estimated to lead the Airborne Countermeasure Systems market in the forecast period

The North American region is estimated to lead the Airborne Countermeasure Systems market in the forecast period. The growth of the North America Airborne Countermeasure Systems market is primarily driven by increasing focus on increasing investments in Airborne Countermeasure Systems technologies by countries in this region. In addition, factors including increasing geopolitical tensions and increased defense-related expenditure are expected to drive the demand for Airborne Countermeasure Systems market in the region.

Airborne Countermeasure System Industry Companies: Top Key Market Players

The **Airborne Countermeasure System Companies** are dominated by globally established players such as **Lockheed Martin Corporation (US), Israel Aerospace Industries Ltd. (Israel), Bae Systems Plc. (UK), L3Harris Technologies, Inc. (US), and Raytheon Technologies**

Corporation (US).

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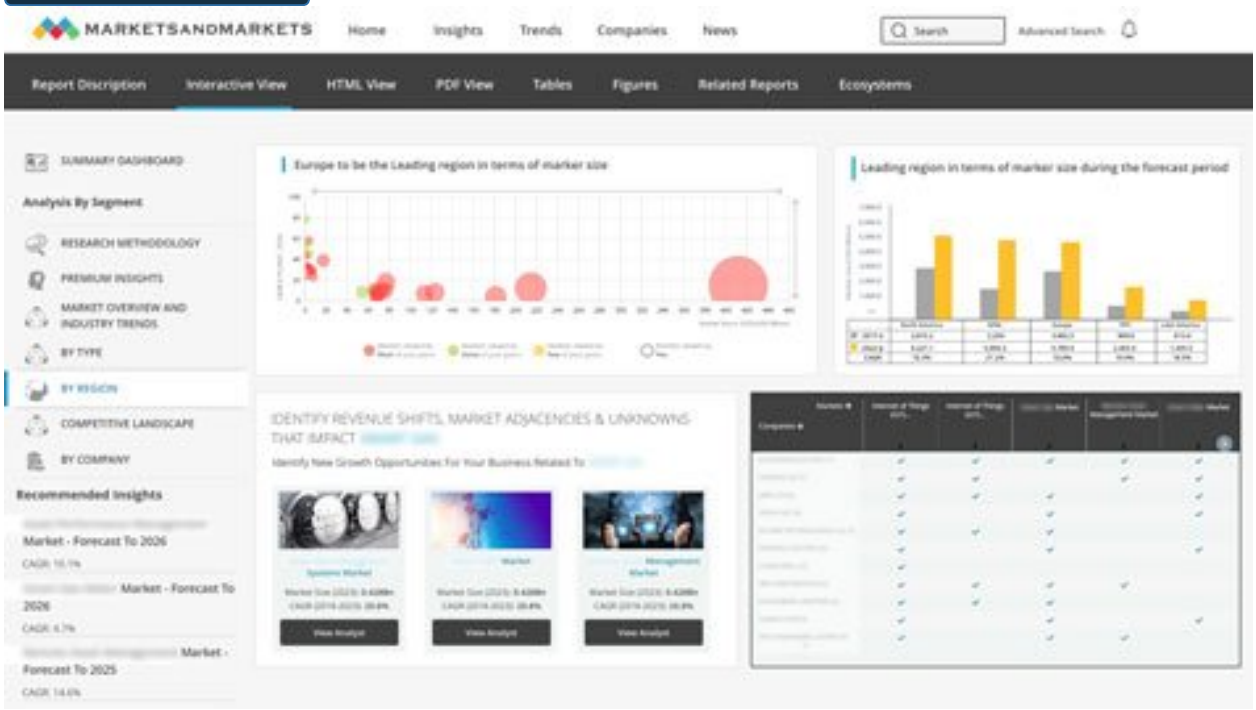

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Scope of the Report

Report Metric	Details
Market size available for years	2018–2026
Base year considered	2020
Forecast period	2021-2026
Forecast units	Value (USD Million)
Segments covered	By Platform, By Product, By Operation, By Capability
	North America, Europe, Asia

Geographies covered	Pacific, Middle East & Africa and Latin America
Companies covered	Lockheed Martin Corporation (US), Northrop Grumman Corporation (US), Thales Group (France), Israel Aerospace Industries Ltd.(Israel), Raytheon Technologies Corporation (US), BAE Systems (UK), Saab AB (Sweden), Elbit Systems (Israel) and L3Harris Technologies (US). and others. Total 25 Market Players

The study categorizes the Airborne Countermeasure Systems market based on platform, capability, product, and operation, along with region.

By Platform

- Military Aircraft
- Military Helicopters
- Unmanned Systems

By Application

- Jamming
- Missile Defence
- Counter Countermeasure

By Product

- Jammers
- Self-protection EW Suites
- Directed Energy Weapons
- Infrared Countermeasures
- Identification Friend or Foe (IFF) Systems
- Missile Approach Warning Systems
- Laser Warning Systems
- Radar Warning Receivers
- Electronic Counter Countermeasure Systems

By Region

- North America
- Europe
- Asia Pacific
- Middle East & Africa
- Latin America

Recent Developments

- In July 2021, BAE Systems received a contract from the US Army to deliver the next-generation 2-Color Advanced Warning System (2CAWS). The system provides aircrews with advanced threat detection capabilities, improving survivability and mission effectiveness in contested environments.
- In June 2021, L3Harris Technologies' ESI-500 Electronic Standby Instrument was selected for standard production on the Bristell B23 aircraft made by Czech Republic-headquartered BRM AERO, which depicts 3D terrain and obstacles to reflect topography and hazards with impact alerts shaded to increase situational awareness.
- In June 2021, IAI signed a contract with an undisclosed Asian country to provide support services for the Heron UAV
- In April 2021, Boeing Defence Australia (BDA) and Northrop Grumman Australia partnered to develop a solution for the Joint Interface Control System to integrate data coming in from multiple and independent secure networks to create a single operational view for improved situational awareness.

Frequently Asked Questions (FAQ):

Which are the major systems considered in this study and which segments are projected to have a promising market share in future?

What are some of the drivers fuelling the growth of Airborne Countermeasure Systems market?

I am interested in understanding the research methodology on how you arrived at the market size and segmental splits before making a purchase decision. Can you provide me with an explanation on the same?

What kind of information is provided in the competitive landscape section?

To speak to our analyst for a discussion on the above findings, click **Speak to Analyst**

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